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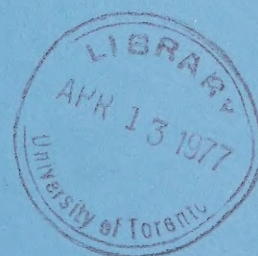
AN OCCUPATIONAL PROFILE



Ontario

Ministry of
Colleges and
Universities

Program
Resources
Branch



HEATING, REFRIGERATION & AIR CONDITIONING

31-2254 (8/76)

SALESMAN/WOMAN

HEATING, REFRIGERATION AND AIR CONDITIONING

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The History of the Analysis

On February 15, 1974 as a result of a series of meetings between representatives of the Heating, Refrigeration and Air Conditioning Industry, the Government of Ontario and the Federal Government, agreement was reached to participate in a Canada-wide joint Industry Task Analysis Program.

The Program Resources Branch, Ontario Ministry of Colleges and Universities, accepted the responsibility of providing trained analysts to conduct the actual analysis within Ontario with the guidance of a steering committee selected from a cross-section of the industry and operating under the Chairmanship of Mr. W.F. Marshall of Marshall Refrigeration Co. Ltd.

The Program Resources Branch, Ministry of Colleges and Universities wishes to acknowledge the support and assistance of the following members of the H.R.A. Industry Analysis Steering Committee:

W.F. Marshall (Chairman)	Marshall Refrigeration Co. Ltd.
L. Cianfarani	Ontario Sheet Metal & Air Handling Group
P. Drabinsky	Techaire Systems Inc./O.R.A.C.
R.D. Fraser	H.R.A. Institute of Canada
G. Granek	G. Granek & Associates
J.W. Ingram	Shell Canada Ltd./O.P.A.
W. Podd	Mohawk College/R.S.E.S.
P.F. Reynolds	Jenkinson & Co. Ltd./ASHRAE
N.W. Walden	O.R.A.C.
D.R. Wheeler	Lennox Industries (Canada) Ltd./ HRAI
H. Anderson	Margell Mechanical Contractors Ltd.

Scope of the Analysis

The analysis contains only those phases of the Industry considered essential in the Province of Ontario. It is limited to the body of knowledge and skills as outlined and agreed to by the Industry Analysis Steering Committee.

It was agreed that the analysis should be broad enough to cover the whole family of occupations which are representative of the Heating, Refrigeration and Air Conditioning Industry up to, but not including, professional or pure management levels. The scope of each of the occupational groups to be covered, including a general breakdown of the industry as defined by the Committee, is represented graphically by Fig. 1.


Fig. 1

HEATING		AIR CONDITIONING		REFRIGERATION	
Domestic		Automotive		Mobile	
Commercial		Residential		Marine	
Gas		Commerical/Residential		Commerical	
Oil					
	Sheet Metal				
		Electrical			
		Plumbing			
MANUFACTURING		SYSTEM DESIGN	DISTRIBUTION	INSTALLATION AND SERVICE	
Applications Tech.	Design Consultant	Applications Tech.	Applications Tech.	Applications Tech.	
Sales Tech.	Estimator	Sales Tech.	Sales Tech.	Estimator	
Telephone Order Desk	Design Draftsman	Purchasing	Purchasing	Sales Tech.	
		Order Desk	Order Desk	Field Inspector	
		Countermand	Countermand	Mechanic	
		Order/Picker and/or Stockman	Order/Picker and/or Stockman	Purchasing	
				Service Order Desk	

Objectives

Although one of the essential aims of this industry/government project is to establish an Ontario standard, it is expected that a number of equally important benefits will be provided such as:

- a basis for effective training to meet the needs of all levels of the industry in order that industry's training resources may be utilized more effectively;
- a career plan with various entry and exit levels to meet individual requirements;
- a basis for common training programs across Canada with a national standard of certification;
- a means for counselling students and attracting young people into a fast growing segment of the economy;
- a means of improving communications between industry and government on training matters.



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Statement of Method

The survey, conducted by field analysis teams supervised by Mr. G.I. Bruce, Senior Training Consultant, commenced in the fall of 1974. By means of personal interviews with industry management and employees, the individual tasks comprising each occupation were determined.

The analysis teams, coordinated by G.F. Starink, asked such questions as:

- What does the worker do?
- How does the worker do it?
- Why is he/she doing it?
- What are the skills and knowledge involved?
- What is the minimum acceptable standard of performance expected?

The goals established were to determine which occupations make up the industry, to describe them in terms of performance objectives and performance standards and through these "occupational profiles" to produce a structured training progression.

Data from Statistics Canada was used to determine the population (i.e. companies) distribution for H.R.A. Industries in Ontario. A representative sample, from which valid and reliable data could be extracted, was established with the aid of the Steering Committee using agreed upon guidelines to cover significant differences for: - geographical distribution on a north/south basis; establishment size (1-10 and 11 plus); number and types of companies within each of the heating, refrigeration and air conditioning segments of the industry.

In the Industry sample encompassing over 50 companies across Ontario approximately 100 interviews were conducted and the resultant data recorded.

A task analysis of this data resulted in a consolidation of occupations from the 57 titles found within the industry to the 12 major occupations submitted to the Steering Committee in mid 1975.

The order of completion of the occupational profiles will be in accordance with priorities established by the Steering Committee.

Occupational Profiles

The following occupational profiles have been accepted by the Steering Committee. Occupations not indicated as completed are subject to on-going modification in title and content subject to approval by the committee.

Each profile is a description of the occupation in terms of performance objectives and performance standards for Ontario.

- Refrigeration & Air Conditioning Mechanic
(Completed Dec./75)
- Counterman H.R.A.
(Completed Jan/76)
- Warehouseman H.R.A.
(Completed Jan./76)
- Salesperson
- Heating Serviceman - Gas & Oil
- Design Draftsman (Intermediate, Junior)
- Designer (Technician)
- Designer (Technologist)
- Dispatcher
- Estimator
- Order Desk Clerk
- Purchasing Agent

SPECIFIC PERFORMANCE OBJECTIVES for:

SALESMAN/WOMAN
Heating, Refrigeration & Air Conditioning

CCDO No.

No.	TERMINAL OBJECTIVES : to be able to ...	ENABLING OBJECTIVES : will be able to ...	TERMINAL PERFORMANCE CRITERIA : Minimum acceptable standard...
	<p>COMMUNICATE EFFECTIVELY</p> <ul style="list-style-type: none"> - Converse effectively by telephone and face to face through the use of various techniques - Write business letters and prepare written reports - Develop presentation skills - Understand and resolve customer complaints and problems while maintaining company's point of view and customer satisfaction - Use tact and judgement in investigating customer credit, collecting overdue payments and analyzing poor market performance etc. - Anticipate customer and engineering demands and be prepared to supply or extract the necessary data - Develop verbal ability to express meanings and uses of technical terminology and ideas associated with them. - Arrange and conduct meetings with customer, engineering and/or installation groups - Determine the most appropriate and effective time to approach each customer - Interpret and relate company policy to clients - Liaise with customer and other departments 		<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - communicate using the most effective medium for maximum results - function as part of a selling team - prepare sales and special market reports - create rapport with other departments - make presentations to groups using audio-visual aids - obtain feedback on product acceptance, advertising and company policy and relate to appropriate department

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	<p>READ: CATALOGUES, HANDBOOKS AND MANUALS</p>	<ul style="list-style-type: none"> - Interpret standard terms, symbols and codes used in heating, refrigeration and air conditioning - Translate part numbers, descriptions and notes found in catalogues, handbooks and manuals - Search and locate information on a specific technological process - Search and evaluate system elements and/or individual equipment units from corresponding identifiers including capacities, ratings and dimensions through the use of charts, tables and graphs - Establish the differences where more than one model, type or system can be implemented - Locate and evaluate technical literature to supplement data required by client groups and to keep abreast of current related technology 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - Verify a selected system and/or equipment unit by comparing relevant information extracted from catalogues, handbooks and manuals, with the corresponding requirements of the customer - Determine the parameters of performance - Confirm the selected equipment using data from source of literature to support and clarify the basis of final selection - Extract the data required to: <ul style="list-style-type: none"> - size HRA units - check air and refrigerant properties and operating parameters against design estimates - select replacement units - select estimate factors 		

CCDO No.

SALESMAN/WOMAN
Heating, Refrigeration & Air Conditioning

SPECIFIC PERFORMANCE OBJECTIVES for:

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	<p>READ:</p> <ul style="list-style-type: none"> - MECHANICAL AND ARCHITECTURAL DRAWINGS, SPECIFICATIONS AND CONTRACTS 	<ul style="list-style-type: none"> - Identify and interpret: <ul style="list-style-type: none"> - numerical values and their associated units - dimensions - the title block and scale - orthographic projections - pictorial drawings - abbreviations, signs and symbols - wiring diagrams - Interpret critical path analysis charts - Identify and interpret data for load calculations - Interpret and analyse piping and duct layouts - Determine existing or designed capacities of buildings (including electrical, gas, oil, water and air supply) - Analyze competitors heating, refrigeration and air conditioning system proposals - Convey information to: <ul style="list-style-type: none"> - the customer - engineering design - drafting 	<p>The Salesman/Woman will:</p> <p>Read prints and diagrams and extract the data required to:</p> <ul style="list-style-type: none"> - aid in the selection of HRA systems and components - determine equipment location - determine layout of piping, ducting and controls - calculate load requirements

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	Develop Sales Leads	<ul style="list-style-type: none"> - Maintain and expand sales leads through personal contacts by developing a customer relationship based upon trust, reliability and dependability - Evaluate, by reviewing and analyzing, construction reports, government and related industry activities, etc. - Select the appropriate department and/or level of contact for initial and subsequent approaches in diverse corporate structures - Develop an awareness of trends in industry, market complexity, diversity of customer population and demands - Schedule prospect calls - Qualify prospects - sales volume, profit potential, credit potential 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - follow-up sales leads resulting from requests for estimates and quotes - monitor and extract sales leads from construction reports, tenders, new company and reorganization announcements, etc. - generate sales leads through long standing customers - obtain and maintain prospect lists - make prospecting a continuous process 	

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	ANALYZE CUSTOMER NEEDS	<ul style="list-style-type: none"> - Understand, Interpret and evaluate technical data - Formulate and define the customer's problem in terms of his technical, economical, social and business needs - Understand the theory and function of heating, refrigeration and air conditioning systems and their components - Apply techniques of deductive questioning to obtain the elements of the customer's needs - Perceive by visualizing the layout and operation of equipment in existing installations and to visualize the effects of modifications to equipment or facilities - Research and evaluate equipment application in specialized areas 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - prepare an appropriate interpretation of customer needs, leading to the correct identification of the system, equipment unit, or modification necessary. 	

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	RECOMMEND SYSTEM LAYOUT DESIGN	<ul style="list-style-type: none"> - Understand and evaluate construction and mechanical drawings - Interpret and use technical tables and charts (e.g., ASHRAE) - Develop an intimate knowledge of the equipment - Calculate heat loss/or heat gain values - Determine the adaptability of the existing system - Determine the ducting required - Determine the load requirement - Size equipment - Determine energy requirement (electric, gas, oil) - Determine method and location of installation 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - present a complete system or equipment configuration which will meet the design criteria - submit details of the adaptability of existing systems to other equipment and/or systems and satisfying the design criteria - outline the location and installation of equipment complying with local codes and regulations

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	<p>SELECT A SYSTEM AND/OR EQUIPMENT FOR:</p> <ul style="list-style-type: none"> - HEATING, REFRIGERATION AND AIR CONDITIONING 	<ul style="list-style-type: none"> - Understand the function and limitation of the system components and their interaction with the system elements - Understand the operation of HRA systems with emphasis on variables such as: <ul style="list-style-type: none"> - temperature - pressure - air flow - superheating - power supply - Interpret and apply terminology used by customer, manufacturer and trade - Transpose customer specification or information into system selection data such as: <ul style="list-style-type: none"> - equipment type - capacity - dimensions - configuration - mode of operation - Determine optimum product requirement for customer need by considering factors such as: <ul style="list-style-type: none"> - pricing economics - product flexibility - operating range - maintenance cost (including operating costs) - safety and Government acts and regulations 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - select a system and/or equipment unit: <ul style="list-style-type: none"> - from those types functionally identified as especially suitable or compatible for specific customer application - that meets local codes and regulations - verify with customer that the parameters of the selected system and/or equipment unit fulfill relative needs - Select acceptable alternative systems and/or equipment units that will: <ul style="list-style-type: none"> - provide the customer with a choice of model and accessories - compete with a specific competitor's product 	

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		<ul style="list-style-type: none"> - Identify HRA equipment by name, type, code number and physical appearance - Evaluate relevant tax implications 	

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	<p>PREPARE COST ESTIMATES</p> <ul style="list-style-type: none"> - Develop rough piping and wiring layout - Determine system required - Develop estimates for the following: <ul style="list-style-type: none"> - equipment component cost - installation cost - system cost - construction cost for small installation - energy consumption and cost - Understand and use the format used by industry for estimating - Understand the limitations of all inclusive unit cost figures (i.e., installation cost \$'s per BTU or Ton of refrigeration) - Analyze and utilize estimates for sub-contracting where required - Determine operation and maintenance cost 	<ul style="list-style-type: none"> - Develop rough piping and wiring layout - Determine system required - Develop estimates for the following: <ul style="list-style-type: none"> - equipment component cost - installation cost - system cost - construction cost for small installation - energy consumption and cost - Understand and use the format used by industry for estimating - Understand the limitations of all inclusive unit cost figures (i.e., installation cost \$'s per BTU or Ton of refrigeration) - Analyze and utilize estimates for sub-contracting where required - Determine operation and maintenance cost 	<p>The salesman/woman will:</p> <ul style="list-style-type: none"> - Submit an estimate that contains all the variables necessary and sufficient for a particular job - Submit an estimate that clearly states the parameters of the cost figure - Submit alternative cost estimate based on such elements as: <ul style="list-style-type: none"> - equipment variation - different energy type - competitors proposal - projected expansion 	

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	PREPARE QUOTES	<ul style="list-style-type: none"> - Understand profit margin limitations of the company - Understand the production cost element of the equipment - Determine the lead time required for the equipment - Understand and interpret the terms of warranty - Understand the fundamentals of standard conditions of sale (e.g. FoB....) - Anticipate and evaluate competitors quotes - Determine and include supplemental input required from other departments relative to the type of quotation 	<p>The salesman/woman will:</p> <ul style="list-style-type: none"> - Present a quotation which contains a comprehensive itemization of equipment, including prices and statement of the company position - provide the customer with a satisfactory explanation of the proposed contract - Substantiate his decisions to the sales manager

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	ESTIMATE CUSTOMER LOAD REQUIREMENT	<ul style="list-style-type: none"> - Determine the use of the building - Determine the annual temperature variations of the locality - Determine the desired temperature level - Determine the insulation factors for such elements as: <ul style="list-style-type: none"> - walls - floors - windows, etc. - Calculate the physical dimensions of the building - Determine the sensible heat factors from sources such as: <ul style="list-style-type: none"> - loading frequency - people - lights (watts) - appliances - volume and type of product to be stored, etc. - Utilize standard load calculation forms and determine the limitations in their use - Determine the system operating time in hours per day 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - present load calculation that contains all the necessary factors that includes both the physical and use factors, such that, the equipment will operate effectively and safely - present the estimate so it lends itself to equipment selection by giving load limitations and optimal operating characteristics 		

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	<p>RECORD & RESEARCH TRANSACTIONS</p>	<ul style="list-style-type: none"> - Identify and use business forms commonly used such as: <ul style="list-style-type: none"> - shipping - receiving - inter-office communication - service - credit - Ascertain precisely what information is required from each type of transaction for efficient operation and record purposes - Make necessary calculations using: <ul style="list-style-type: none"> - price list - discount list - tax list - service guide - special arrangement - warranties and guarantees - Determine relevant information and methods for notifying shipping, purchasing, accounting servicing and sales department - Determine origin and destination of all company and customer related documentation 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - Select the proper business forms for the appropriate transaction - Gather data necessary for completing the forms by retrieving the necessary files and information - Acceptable Business forms will be: <ul style="list-style-type: none"> - accurate - complete - legible - neat - Despatch copies to designated places according to inter-office procedures - Provide the customer with additional documentation and clarification where required - Maintain a current file on active transactions requiring monitoring by the sales department

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	<p>ASSESS ENERGY CONSERVATION FACTORS</p>	<ul style="list-style-type: none"> - Determine the availability of energy supply (fuel and/or electricity) - Analyze the efficiency ratings of equipment with respect to energy consumption - Understand the codes and regulations governing energy - Understand the economics and efficiency factors associated with different modes of energy - Develop an understanding for the conservation of energy due to factors such as: <ul style="list-style-type: none"> - equipment - insulation - system design - product preparation, etc. - Understand the limitations for different modes of energy - Calculate the savings to the customer from the use of energy recovery devices - Determine the safety factors involved with fuel (gas and oil) 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - select a system which best meets the current requirement for the conservation of energy and satisfying the customer needs - select a system which can adapt to different modes of energy to conserve and/or economize on energy while complying with pollution standard - select an appropriate energy recovery device with an estimate of the accruable benefits

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	<p>APPLY THE FUNDAMENTALS OF SALES PSYCHOLOGY</p>	<ul style="list-style-type: none"> - Use a knowledge of perception by recognizing: <ul style="list-style-type: none"> - sales as interaction between two people and understanding the rationale for differences between prospects - the factors determining prospects differences in interpreting words and responding - the factors of perceptual set - Utilize various stimuli by: <ul style="list-style-type: none"> - having an awareness of the stimulus - response concept - recognizing sales messages as stimuli - recognizing how sales messages re-direct set - Understand the techniques that can change thinking and resultant behavior 	<p>The Salesman/woman will attempt to develop an acceptance for the product and service and overcome resistance or opposition by the sales prospect by utilizing the fundamentals of sales psychology.</p>		

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	<p>APPLY THE FUNDAMENTALS OF SELLING TECHNIQUES</p>	<ul style="list-style-type: none"> - Understand and function within the ethics of selling - Evaluate customer objection - Differentiate product type - Convey the product benefits to the customer - Determine when and how to ask for additional business - Tailor sales presentation to each customer - Understand the feelings of people which affect their buying decision such as: <ul style="list-style-type: none"> - insecurity - prejudice - aggression - hostility - prestige 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - display a high level of self control and maturity while dealing with the customer - adjust to situations by projecting a sense of empathy to the customer's feelings and needs - obtain a sales contract which satisfies both the vendor's and customer's objectives - co-ordinate and utilize company promotions and also capitalize on promotional opportunities - reduce customer resistance to product by using the appropriate sales aids and overcoming customer lack of knowledge

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	<p>PROVIDE CUSTOMER SERVICE</p>	<ul style="list-style-type: none"> - Analyze and interpret financial records including the balance sheet and financial statement - Analyze and interpret both customer and HRA industry reports - Develop a budget - Understand technique for costs analysis - Understand the fundamentals of inventory control - Understand and identify the technique and elements associated with efficiency and costs savings - Determine the necessary technical and business literature required by customers - Develop and evaluate purchase contracts - Evaluate the allotment of time and effort given to customer service functions relative to: <ul style="list-style-type: none"> - potential sales - repeat customer need - value of resultant sale 	<p>The Salesman/woman will:</p> <ul style="list-style-type: none"> - prepare reports to show reduced costs and/or increased efficiency resulting from proposed change - identify the source of financial and business problems and suggest appropriate solutions to the customer - provide the customer with available aids and sources of information for better business practice

